# Service Design and Transition Package (SDTP) Template

The page title should use the following format "SDTP: [Service Name]"

# Document Control

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| --- | --- |
| **Author** | Lead author and main person responsible for the SDTP |
| **Document Status** | DRAFT  CHANGED REQUESTED  READY FOR SSB REVIEW  READY FOR COUNCIL REVIEW  APPROVED  REJECTED |
| **Major Change** | Summarise the major change documented with this version of the SDTP (e.g., new service, change of service phase, major change to features, major change to user interface) |
| **SSB Approval Date** |  |
| **EGI Council Approval Date** | Date the SDTP was approved |
| **Change Log** | Track/describe all major changes made to the SDTP |
| **Change Log for the Template** | 14.0.7.2017: Added "Service Portfolio" attribute13.06.2017: Added "Service Order Workflow" in Section 3, updated check-list for "Planning" and "Alpha" 29.05.2017: Added service phase check list in Section 425.11.2016: Added "service options" and "service requests"; changed all instructional text into normal text11.05.2016: Improved header |

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# Section 1: Value Proposition Design

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| **Value Proposition Design** | |
| Customer / User Profile |  |
| **(Potential) Customer of the service** | A customer commissions the service provider to receive the service, doing so on behalf of a number of users (see below) – specify the organisation type/category of the service e.g. NGI; RI; Resource Provider |
| **(Potential) User of the service** | Specify the user type/category of the service e.g. large research groups; individual researcher; site admins |
| **User profile**  **(pains/gains)** | Describe the situation without the new or changed service, including potential pain points the service is intended to resolve or unexploited opportunities for the customer(s) |
| Service Overview |  |
| **Service Name** | Clear, short name of service |
| **Service Portfolio** | Specify which service portfolio this service belongs to (e.g., [*EGI Service Portfolio*](file:////display/IMS/EGI+Service+Portfolio), [*EGI Internal Service Portfolio*](file:////display/IMS/EGI+Internal+Service+Portfolio)) |
| **Service Area** | See description in [*Service Areas*](file:////display/IMS/Service+Areas) (if no defined area is suitable, you can propose a new one) |
| **Service Phase** | Phase of the service design selected among: - discovery: researching users needs, exploring technological or policy constraints- alpha: service prototype is available for closed set of users- beta: service being developed while available for testing publicly- production: service available in the live environment meeting security/performance requirements- retired: service is not anymore offered  \*Note: services in beta and production phase are live and can be part of the service catalogue (see the page [*Service Phases*](file:////display/IMS/Service+Phases) for more information) |
| **General description** | Provide a high-level description of what the service does and functionality included  i.e. Grid Compute: A service that allows to run computational tasks on high quality IT resources, accessible via a uniform/standard interface and supporting authentication/authorisation based on a membership within a virtual organisation. Grid Compute services are federated together from hundreds of providers across Europe and beyond offering seamless access to computing capabilities with integrated monitoring and accounting |
| **Value Proposition**  **(pain relievers / gain creators)** | Describe how the new or changed service alleviates specific user pains and/or supports its intended customer(s) to exploit new opportunities |
| **Tagline** | 1-line value proposition |
| [**EGI Strategy**](http://go.egi.eu/strategy2020) | Describe how this aligns to the EGI strategy (provide specific reference(s) to the document e.g. page, section numbers) |

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| ****Success Criteria**** | | | |
| **Objective** | **Indicator** | **Description** | **Target** |
| Define one or more strategic objectives for this service | Name of the performance indicator(s) used to measure the progress towards the objective | Short description of the indicator and of how it will be measured | Target value for the chosen indicator(s) |
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\* Success criteria are defined with the objectives and may be quantified by performance indicators

# Section 2: Business Case Design

| **Business Case Design** | | | |
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| **The following business case has been developed to support informed decision-making with respect to the extension or change of the service portfolio from a strategic perspective** | | | |
|  | **Best case** | **Average case** | **Worst case** |
| **Demand assessment** | Describe what is the full market potential (all user types / categories and size) and most likely uptake possible | Describe somewhere between the best and worst case scenario | Describe the minimal uptake of the service e.g. only by EGI federation; 1 user group |
| **Assumptions**  (about market uptake) | What assumptions need to be made to expect the best case scenario e.g. EC policy supports it; no commercial alternative; high user friendliness will equal mass uptake | What assumptions need to be made to expect the average case scenario e.g. requested by multiple user groups ensuring some uptake | What assumptions need to be made to expect the worst case scenario e.g. service design is high quality and will be supported at least internally |
| **Expected organisational impact on the service provider** | In the best case scenario, what organisation changes would need to be made to support the demand e.g. additional staff, expanded data centre, no impact | In the average case scenario, what organisation changes would need to be made to support the demand e.g. additional staff, expanded data centre, no impact | In the worst case scenario, what organisation changes would need to be made to support the demand e.g. additional training of staff, no impact |
| **Expected Cost** | Provide an estimate of the resources required to develop (CAPEX) and maintain / operate (OPEX) the service in the best case e.g. human effort; financial investment | Provide an estimate of the resources required to develop (CAPEX) and maintain / operate (OPEX) the average case e.g. human effort; financial investment | Provide an estimate of the resources required to develop (CAPEX) and maintain / operate (OPEX) the worst case e.g. human effort; financial investment |
| **Expected Revenue** | What revenue types will the provider obtain in return for the investment described above and possible estimates e.g. direct payment(s); funding; in-kind contribution | What revenue types will the provider obtain in return for the investment described above and possible estimates e.g. direct payment(s); funding; in-kind contribution | What revenue types will the provider obtain in return for the investment described above and possible estimates e.g. direct payment(s); funding; in-kind contribution |
| **Risks** | What are the organisational, technical, financial, market and/or legal risks associated to the service provider e.g. inability to scale to demand | What are the organisational, technical, financial, market and/or legal risks associated to the service provider e.g. competitor offers better / cheaper service | What are the organisational, technical, financial, market and/or legal risks associated to the service provider e.g. technology is not mature and stable enough to deliver required customer levels |
| **Supplier Evaluation** | If any supplier(s), whether of potential service components and/or technology, will be needed or have been identified, describe the rationale and technical evaluation to ensure the service can/will be supported | | |
| **Constraints / limiting factors** | Describe the factors that may limit or hold back the success of the service e.g. size of the market; demand in the market; availability of supply; competition; availability of finances; quality and skills of employees | | |
| [**Access Policy**](https://www.egi.eu/access-policy/) | Select at least 1 of the following 3 access policies the service can be accessed through; if more than one apply, specify the scenario:   * Policy-based: users are granted access to the service based on policies defined by the EGI service provider(s) or by EGI.eu * Wide access: users can freely access the service provided * Market-driven: users can negotiate a fee to access the service either directly with the EGI service provider or indirectly with EGI.eu   Note: services allowing access to rival services (e.g. computing capacity or storage) are usually provided under as policy- or market-driven; services allowing access to non-rival services (e.g. software packages or scientific data) are usually provided under a wide access policy | | |

# Section 3: Service Design

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| **Service Design** |
| **The following aspects must be defined comprising the service requirements, the service architecture (both high-level and technical) and the service acceptance criteria** |

Following, the results of the service requirements analysis:

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| Service Requirements |  |  |
| **Category** | **Requirements** | **Weight**  **(1-10)** |
| **Functional and technical service requirements** |  |  |
| **Availability, continuity and performance-related service requirements** |  |  |
| **Security and data protection-related service requirements** |  |  |
| **Usability-related service requirements** |  |  |
| **Organisational service requirements** |  |  |

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| Service Architecture | |
| **The service architecture provides an overview of the key (logical) service components and their dependencies to help better understand the structure and logical as well as technical setup of the service.** | |
| **High-level service architecture** | These sections describe how the service is built. A service component is a logical part of a service that provides a function enabling or enhancing a service. A service is usually composed of several service components. A service component is usually built from one or more configuration items (CIs).Although a service component underlies one or more services, it usually does not create value for a customer alone and is therefore not a service by itself.   |  |  |  |  | | --- | --- | --- | --- | | **Service components** | | | | | **#** | **Type** | **Description** | **TRL [1]** | | 1 | Choose: Enabling or Enhancing  Definitions:   * Enabling service components are the minimum set of service components that make the service available * Enhancing service components are any additional service components that improves the service, however, the service would still run without them, even if at lesser quality. |  |  | | 2 | Add rows as required |  |  | |
| **Integration and dependencies** | Insert a description and/or visualisation (figure) of the dependencies between the identified service components |
| **Technical service architecture** | Describe the technical service architecture, taking into consideration the following perspectives:  • Environmental architecture • Network infrastructure • Hardware  • Software / applications  • Information |

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| Service Order Workflow |
| Description of the workflow that a customer needs to follow to order the service |
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| Service Acceptance Criteria | | |
| **The service acceptance criteria are based on the results from the requirements analysis and listed in the following table:** | | |
| **Category** | **Acceptance criteria** | **Critical**  **(Yes/No)** |
| **Functional and technical acceptance criteria** | - Functionality to be effectively provided by the service - Other |  |
| **Availability, continuity and performance-related acceptance criteria** |  |  |
| **Security and data protection-related acceptance criteria** |  |  |
| **Usability-related acceptance criteria** |  |  |
| **Organisational acceptance criteria** | - Criteria for effective communication  - Criteria for effective user or support staff training |  |
| **Critical acceptance criteria indicators** | | |
| ***Critical acceptance criteria according to the above table are regarded as show-stoppers. That means that, if any of the critical acceptance criteria is not achieved, the deployment of the service to the live environment will be delayed.*** | | |
| **Number of unachieved critical acceptance criteria preventing deployment** | [insert number] | |
| **Number of unachieved non-critical acceptance criteria preventing deployment** | [insert number] | |

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| Service Options | | | |
| Service options are possible choices that the customer can/should specify when commissioning the service (e.g. for the service "cloud compute", the customer can specify the type of virtual machine with the number of cores, RAM; for the service "FitSM training" the customer should specify the level of the training and if he/she wants a certification) | | | |
| **#** | **Name** | **Description** | **Attributes** |
| 1 | Add a name for this option | Add a description for this option; this description is targeted to potential customers who need to understand what each option is about and being able to choose the best for their needs | Add attributes as numbered bullet lists in the form of :1. attribute name: [possible values] 2. attribute name: [possible values] ... |
| 2 |  |  |  |
| 3 |  |  |  |

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| Service Requests | | |
| Service requests are user request for information, advice, access to a service; please specify the list of service requests that will be supported during the provision of this service (e.g., provide general information and advice, change password, increase capacity) | | |
| **#** | **Name** | **Description** |
| 1 |  |  |
| 2 |  |  |

# Section 4: Service Transition Plan

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| **Service Transition Plan** |
| **The following table provides the service transition plan for the new or changed service that services as the action plan regarding all activities to be carried out** |

Transition plan:

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| ****Transition Plan**** | **Activities and timing** | **Responsibilities (RACI) [2]** | **Progress report** | **Links/References to other documents** |
| **Specification, negotiation and agreement** | list the main activities to be performed (using the task function of confluence) and the deadline (using the date function); see instructions in [*Confluence howto*](file:////display/IMS/Confluence+howto) |  |  |  |
| **Development and procurement** |  |  |  |  |
| **Testing** |  |  |  |  |
| **Operation with early life support** |  |  |  |  |
| **Regular operation** |  |  |  |  |

## Service phase check-list

This is a check-list to evaluate that [pre-requisites for a specific service phase](https://confluence.egi.eu/display/IMS/Service+Phases) are met. The requirements are **incremental**, that means that if a service is in phase 'beta', all requirements from the beta and from the previous phases need to be verified. Names for the process managers are defined in the page [Roles, Responsibilities, Communication](file:////display/IMS/Roles%252C+Responsibilities%252C+Communication#Roles,Responsibilities,Communication-IMSassignment). The SSB chair is specified in the [SSB wiki page](https://wiki.egi.eu/wiki/SSB:Members).

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| --- | --- | --- | --- | --- |
| **Service phase name** | **Description** | **Conditions** | | |
| **Who** | **Description** | **Verification** |
| Discovery | Researching users needs, exploring technological or policy constraints | Service owner | SDTP part 1 and 2 developed | Check that all fields in section 1 and 2 are complete and add confirmation here |
| SSB Chair | SSB approved SDTP | Add date and link to SSB event where the SDTP was approved |
| SPM manager | Initial entry in the service portfolio available | Add URL to the service portfolio entry |
| Planned | A plan to develop the service is defined | Service owner | SDTP part 3 and 4 are completed | Check that all fields in section 1-4 are complete and add confirmation here |
| SSB chair | SSB approved SDTP | Add date and link to SSB event where the SDTP was approved |
| SPM manager | The initial service description, value proposition and tagline in the SDTP is validated by the EGI Communication Team | State that the action was completed and link the related service portfolio entry |
| Alpha | Service prototype is available for closed set of users | Service owner | At least one provider is offering the service for early evaluation purpose | Specify the name of the provider offering the service |
| Beta | Service being developed while available for testing publicly | Service owner | The service provides most of the planned functionalities although security and performance requirements are not guaranteed | * Add explicit confirmation and summarise what are the key missing functionalities to be completed before production * Add link to testing reports dcoumenting the performed testing activity and results |
| Service owner | Performed the service risks assessment together with [RM process manager](https://confluence.egi.eu/pages/viewpage.action?pageId=1867827) and related risks were added to the [risk registry](https://confluence.egi.eu/display/IMS/Risks+registry) | Add date when the risk assessment was conducted and list the risks that were added to the registry |
| Service owner | Activated the support through EGI helpdesk | Add the information to the [*related support unit*](https://wiki.egi.eu/wiki/Category:FAQ_Responsible_Units_%28GGUS%29) |
| Service owner | Capacity and availability plan is created in collaboration with the [CAPM process manager](https://confluence.egi.eu/pages/viewpage.action?pageId=1084071) | Add URL to the plan |
| Service owner | Review the list of service requests together with the SLM manager | Add date of the review performed together with the SLM manager |
| SLM manager | OLA/UA are agreed with the involved providers and the SLA document template is defined | Add URL to the defined documents |
| SLM manager | Added the service to one or more Service Catalogues (optional, if requested) | Add URL |
| SLM manager | The initial service portfolio entry was filled and validated by the EGI Communication Team | State that the action was completed and link the related service portfolio entry |
| SFRM manager | The service is offered at least by one provider for testing | List the provider(s) offering the service for testing |
| Production | Service available in the live environment meeting security/performance requirements | Service owner | The capacity and availability plan is updated in collaboration with the [CAPM process manager](https://confluence.egi.eu/pages/viewpage.action?pageId=1084071) | Confirms that the plan was updated |
| Service owner | The service meets the security and performance requirements identified in the SDTP or defined by the EGI policies | * Confirm that requirements are met * Add link to testing reports documenting the performed testing activity and results |
| Service owner | At least one customer approved that the service fulfils the acceptance criteria | Specify the customer who approve the service |
| Service owner | The SDTP is complete | Check that all fields are complete and add confirmation here |
| SPM manager | The service portfolio entry is complete | State here that it is complete |
| SPM manager | Business model and revenue streams are defined | Confirm that they are defined and indicate where the information is available |
| SLM manager | OLA/UA are agreed with the involved providers and the SLA document template is defined | Add URL to the defined documents for the production phase |
| SLM manager | The service is added to one or more Service Catalogues | Clarify which service catalogues the service has been added to |
| SFRM | The service is offered at least by one provider in production | List the service provider(s) offering the service |
| Retired | Service is not anymore offered | Service owner | A technical plan to dismiss the service is defined | URL to the plan |
| Service owner | A communication plan to inform current customers and users was defined | URL to the plan |
| SLM manager | The service is removed from all service catalogues | Confirm from which catalogues the service was removed |
| SLM manager | The providers are informed about the retirement of the service | Clarify how and when the providers where informed |
| CRM manager | The negotiation with current customers/users about how long the service will be guaranteed within the existing agreements are completed | Summarise the results of the negotiation |

[1] Technology Readiness Levels (TRL) are a method of estimating technology maturity of components during the acquisition process. For non-technical components, you can specify “**n/a”**. For technical components, you can select them based on the following definition from the EC:

* **TRL 1** – basic principles observed
* **TRL 2** – technology concept formulated
* **TRL 3** – experimental proof of concept
* **TRL 4** – technology validated in lab
* **TRL 5** – technology validated in relevant environment (industrially relevant environment in the case of key enabling technologies)
* **TRL 6** – technology demonstrated in relevant environment (industrially relevant environment in the case of key enabling technologies)
* **TRL 7** – system prototype demonstration in operational environment
* **TRL 8** – system complete and qualified
* **TRL 9** – actual system proven in operational environment (competitive manufacturing in the case of key enabling technologies)

[2] RACI

* R = Responsible
  + A person or role actually executing / performing / carrying out a process or activity
* A = Accountable
  + The person or role governing a process or activity by defining and approving goals and providing or acquiring resources and capabilities required so that the process or activity can be carried out effectively
* C = Consulted
  + A person or role whose expertise or other kind of contribution is needed to carry out a process or activity without this person being responsible for the process or activity him-/herself
* I = Informed
  + A person or role who needs to be kept informed about the status and/or results of a process or activity